

# Roadmap to Tax Return Filing for 2022

This year, we would like to introduce you to the steps for the tax return filing process:

Any questions or concerns, please call us at 213-438-9101 or email us at [info@cpachoi.com](mailto:info@cpachoi.com). Additionally, you may schedule a 10 mins phone call with your accountant anytime by going to this [link](#).



## Step 1 Client Portal

Upload tax documents to the client portal <https://cpachoi.sharefile.com/Authentication/Login>

## Step 2 Client Organizer

Complete and upload Client Organizer to the client portal (originally sent from [noreply@cpachoi.com](mailto:noreply@cpachoi.com)) – for existing clients only.

For new clients, upload completed New Client Tax Questionnaire form to the client portal

## Step 3 Notify

After uploading all the documents to the portal, notify us by emailing us at [info@cpachoi.com](mailto:info@cpachoi.com) or contact one of our staff accountants

## Step 4 Communication

Communicate by email or set up an appointment with one of our staff accountants by going to this [link](#).

## Step 5 Your CPA/EA

The staff accountant you are working with will send you the link to book an appointment with you CPA/EA when the preparation is done.

You may opt to communicate with your CPA/EA by email instead.

## Step 6 Finalization

Signature forms for the tax return filing will be sent to you to be signed digitally. They will be sent from [noreply@thomsonreuters.com](mailto:noreply@thomsonreuters.com) or Rightsignature.

Email Invoice will be sent and a payment for the tax return filing is required for the filing.

## Step 7 Tax Return filed!

When the tax return is filed, you will be receiving an email with the copy of the tax return sent from [noreply@cpachoi.com](mailto:noreply@cpachoi.com) **It is important that you read the instructions from the copies of the tax returns along with any estimated tax payment requirements, if applicable.**